



Submitting a ChartField Request Form

This guide walks you through completing and submitting a Chartfield Request Form.

**State of Vermont
Department of Finance & Management
VISION 9.2**

January 2019

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Revisions to Manual

January 2019

- Manual written

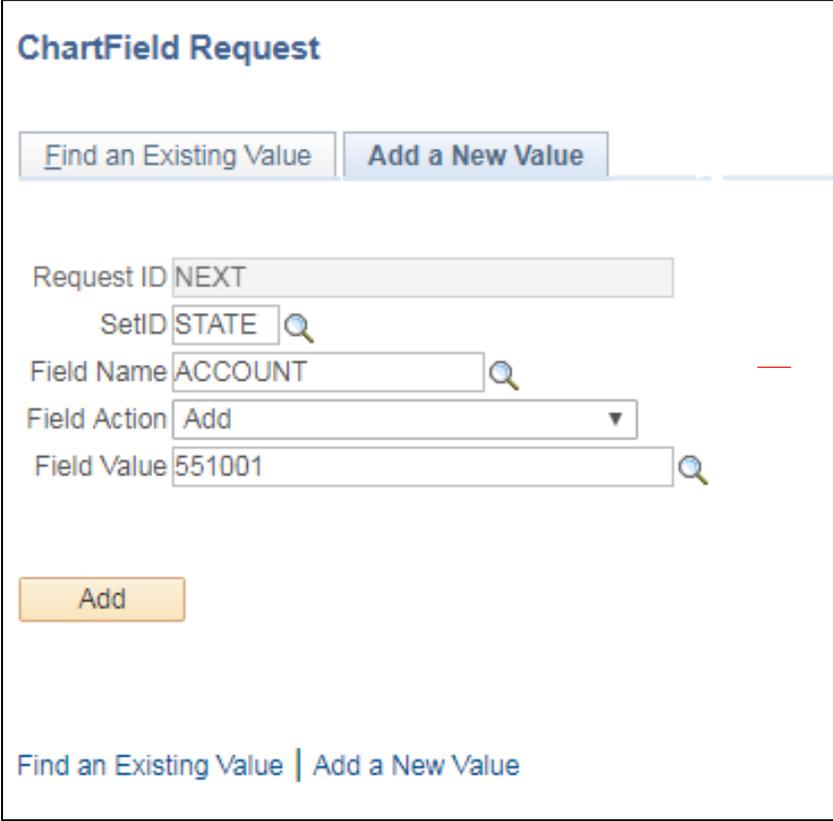
Completing a ChartField Request Form for an Account Code

Situations where this form is used: When you need to add, update, or inactivate an Account Code.

WorkCenter navigation: General Ledger WorkCenter > Links pagelet > Chartfields > ChartField Request
or

Navigator Menu navigation: Set Up Financials/Supply Chain > Common Definitions > Design Chartfields
> Define Values > ChartField Request

The **Add a New Value** page opens:



The screenshot shows the 'ChartField Request' form with the following fields and values:

- Request ID: NEXT
- SetID: STATE
- Field Name: ACCOUNT
- Field Action: Add
- Field Value: 551001

Buttons for 'Find an Existing Value' and 'Add a New Value' are visible at the top and bottom of the form.

Request ID defaults to NEXT

SetID enter STATE

Field Name select ACCOUNT from the list of options

Field Action select from the drop-down menu

- Options are Add or Update

Field Value enter the value you want to add or update (6 characters)

- Finance and Management reserves the right to change the value to comply with VISION's numbering convention

Click **Add**

The **Account ChartField Request** page opens:

Request ID NEXT
Request Status Newly Created
Field Action Add
Telephone 802/828-0678
*Business Unit 01110

SetID STATE
Field Name ACCOUNT
*Field Value 551003
Email ID john.becker@vermont.gov

Core Information

Control Account
 Statistical Account
*Effective Date 01/29/2019
*Status Active
Monetary Account Type E
Unit of Measure
*Description Test Account
*Short Description TestAcc
Long Description

Business Justification
Attachments (0)

Request Comments

Questions

*1. What is the reason for this new or changed Account? Please provide a Statute and/or Act authorizing this new Account or change to existing Account if one exists.
Answer

2. If this request is for a revenue account, what is the revenue source?
Answer

3. If this request is for an expense account, please describe the types of expenditures that would be charged to this account.
Answer

4. Any additional comments about this request?
Answer

Trees

Telephone – Enter the telephone number for the contact person

Business Unit – Enter the business unit for approval routing purposes

Control Account – Leave unchecked

Statistical Account – Leave unchecked

Effective Date – Enter the effective date for the chartfield change

Status – Select ‘Active’ or ‘Inactive’ as appropriate

Monetary Account Type – Select the appropriate account type from the drop-down menu

Description – Enter a description (up to 30 characters)

Short Description – Enter a short description (up to 10 characters)

Long Description – Click the [long Description](#) link – this is an optional field where you can add any additional information about the Account Code that the requestor believes is important, for example a statute reference, or full name that can't fit in the Description box due to the limit of 30 characters.

Request Comments – Expand the [Request Comments](#) box – this is an optional field to add any relevant comments.

A screenshot of a software interface showing a 'Request Comments' field. The field is a large, empty rectangular box with a light gray border. Above the box, the text 'Request Comments' is displayed in a dark font, preceded by a small downward-pointing arrow icon. In the bottom-left corner of the box, there is a small blue icon of a hand with a pencil. In the bottom-right corner, there is a small icon of a document with a plus sign.

The [Attachments](#) link - – this is an optional field used to attach relevant files to the request. See exercise on page 41 for instructions on adding an attachment to a chartfield request.

Answer the four questions and click **Save**:

The screenshot shows a web form for creating a new account. At the top, it displays 'Request ID NEXT', 'Request Status Newly Created', and 'Field Action Add'. There are input fields for 'Telephone' and '*Business Unit' (with '02100' entered). On the right, it shows 'SetID STATE', 'Field Name ACCOUNT', '*Field Value CF40XA', and 'Email ID eric.hoefel@vermont.gov'. Below these are two main sections: 'Core Information' and 'Business Justification'. 'Core Information' includes checkboxes for 'Control Account' and 'Statistical Account', a date field for '*Effective Date' (07/01/2018), a dropdown for '*Status' (Active), a dropdown for 'Monetary Account Type' (R), and text fields for 'Unit of Measure', '*Description' (Test Account), and '*Short Description' (TestAcct). 'Business Justification' has an 'Attachments (1)' section. Below these is a 'Request Comments' section, followed by a 'Questions' section with four numbered questions and their corresponding 'Answer' text boxes. The first question asks for a statute or act, the second for a revenue source, the third for expenditure types, and the fourth for additional comments. The 'Trees' section at the bottom contains a table with columns for 'Requester', 'Entered By', 'Updated By', 'Entered Date/Time', and 'Updated Date/Time'. At the very bottom are buttons for 'Save', 'Notify', 'Add', and 'Update/Display'.

The **Trees** box is only used by VISION Financial Operations, **no entry or selections** should be made under the Trees box

Your request has been assigned a **Request ID** number:

This screenshot is identical to the one above, but the 'Request ID' field is now populated with the value '000000007'. Additionally, a 'Copy' button is visible next to the 'SetID STATE' field.

Select **Submit for Approval** from the **Request Action** drop-down menu and click **Go**:

This screenshot shows a web form for account management. At the top, the 'Request ID' is 000000007 and the 'Request Status' is 'Newly Created'. The 'Field Action' is 'Add'. The 'Business Unit' is '02100'. The 'Request Action' dropdown menu is set to 'Submit for Approval', and a 'Go' button is visible next to it. The 'Requester' is 'Eric John Hoefel', 'Entered By' is 'ETEST', and 'Entered Date/Time' is '10/30/2018 3:41PM'. The 'Updated By' is 'ETEST' and 'Updated Date/Time' is '10/30/2018 3:41PM'. The 'Request Comments', 'Questions', and 'Trees' sections are collapsed. The 'Core Information' section includes 'Control Account', 'Statistical Account', 'Effective Date' (07/01/2018), 'Status' (Active), 'Monetary Account Type' (R), 'Unit of Measure', 'Description' (Test Account), and 'Short Description' (TestAcct). The 'Business Justification' section has an 'Attachments (1)' link. At the bottom, there are 'Save', 'Notify', 'Add', and 'Update/Display' buttons.

Click on the **View Approval Flow** link to see approval routing:

This screenshot shows the same web form as above, but the 'Request Action' dropdown menu is now set to 'View Approval Flow'. The 'Request Status' is now 'Pending Approval'. The 'Requester' is 'Eric John Hoefel', 'Entered By' is 'ETEST', and 'Entered Date/Time' is '10/30/2018 3:41PM'. The 'Updated By' is 'ETEST' and 'Updated Date/Time' is '10/30/2018 3:47PM'. The 'Request Comments', 'Questions', and 'Trees' sections are collapsed. The 'Core Information' section includes 'Control Account', 'Statistical Account', 'Effective Date' (07/01/2018), 'Status' (Active), 'Monetary Account Type' (R), 'Unit of Measure', 'Description' (Test Account), and 'Short Description' (TestAcct). The 'Business Justification' section has an 'Attachments (1)' link. At the bottom, there are 'Save', 'Return to Search', 'Notify', 'Add', and 'Update/Display' buttons.

The **Approval Flow** box opens, click the **Multiple Approvers** link to see who can approve your request:

Approval Flow

Field Request Approval Stage

Request ID 000000007: Pending

View/Hide Comments

Start New Path

Path for Fields Approval

Pending

Multiple Approvers

Chartfield FINOPS Approvers

Comments

Return

Approver #1	
Name:	Peggy Brooks
Description:	Peggy Brooks
Approver #2	
Name:	Collins, Nancy E
Description:	Collins, Nancy E
Approver #3	
Name:	Karen C Jaquish
Description:	Karen C Jaquish
Approver #4	
Name:	Joe Harris
Description:	Joe Harris
Approver #5	
Name:	Becker, John M
Description:	Becker, John M
Approver #6	
Name:	Daniel D Shepard
Description:	Daniel D Shepard

Close

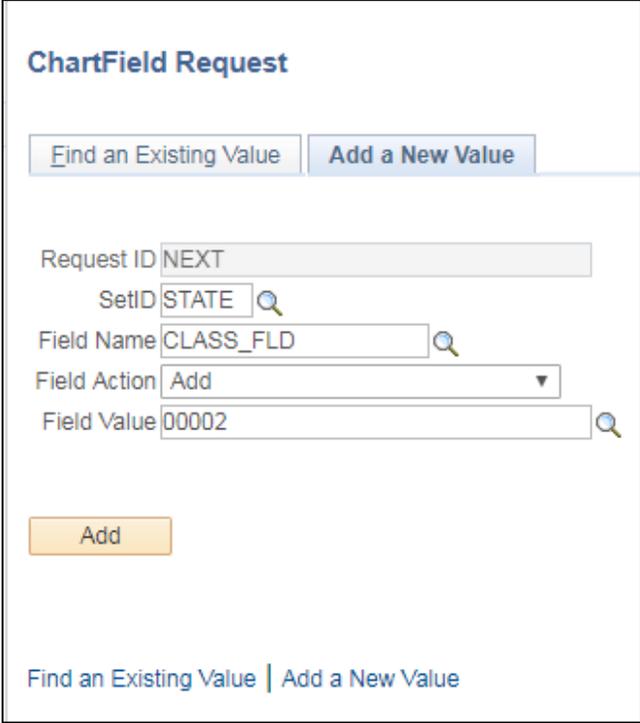
Completing a ChartField Request Form for a Class Code

Situations where this form is used: When you need to add, update, or inactivate a Class Code.

WorkCenter navigation: General Ledger WorkCenter > Links pagelet > Chartfields > ChartField Request
or

Navigator Menu navigation: Set Up Financials/Supply Chain > Common Definitions > Design Chartfields
> Define Values > ChartField Request

The **Add a New Value** page opens:



The screenshot shows the 'ChartField Request' form. At the top, there are two buttons: 'Find an Existing Value' and 'Add a New Value'. Below these are five input fields: 'Request ID' with the value 'NEXT', 'SetID' with the value 'STATE' and a search icon, 'Field Name' with the value 'CLASS_FLD' and a search icon, 'Field Action' with a dropdown menu showing 'Add', and 'Field Value' with the value '00002' and a search icon. Below the fields is an 'Add' button. At the bottom of the form, there are two links: 'Find an Existing Value' and 'Add a New Value'.

Request ID defaults to NEXT

SetID enter STATE

Field Name select CLASS_FLD from the list of options

Field Action select from the drop-down menu

- Options are Add or Update

Field Value enter the value you want to add or update (5 characters)

- Finance and Management reserves the right to change the value to comply with VISION's numbering convention

Click **Add**

The **Class Code ChartField Request** page opens:

Request ID NEXT
Request Status Newly Created
Field Action Add
Telephone 802/828-0678
*Business Unit 01110

SetID STATE
Field Name CLASS_FLD
*Field Value 00002
Email ID john.becker@vermont.gov

Core Information
*Effective Date 01/29/2019
*Status Active
*Description Test Class
*Short Description Test
Long Description

Business Justification
Attachments (0)

Request Comments

Questions

*1. What is the reason for the new or updated Class code?
Answer

*2. Are new Payroll Chartfield Combinations required? If yes, attach spreadsheet with new chartfield combinations
Answer

3. Any additional comments about this request?
Answer

Trees

Requestor

Telephone – Enter the telephone number for the contact person

Business Unit – Enter the business unit for approval routing purposes

Effective Date – Enter the effective date for the chartfield

Status – Select ‘Active’ or ‘Inactive’ as appropriate

Description – Enter a description (up to 30 characters)

Short Description – Enter a short description (up to 10 characters)

Long Description – Click the **long Description** link – this is an optional field where you can add any additional information about the Class Code that the requestor believes is important, for example a full description of the purpose for the code.

Request Comments – Expand the **Request Comments** box – this is an optional field to add any relevant comments.

Request Comments

The **Attachments** link -- this is an optional field used to attach relevant files to the request. See exercise on page 41 for instructions on adding an attachment to a chartfield request.

Answer the three questions and click **Save**:

<p>Request ID NEXT</p> <p>Request Status Newly Created</p> <p>Field Action Add</p> <p>Telephone 802/828-0678</p> <p>*Business Unit 01110 <input type="text"/></p>	<p>SetID STATE</p> <p>Field Name CLASS_FLD</p> <p>*Field Value 00002</p> <p>Email ID john.becker@vermont.gov</p>
---	--

Core Information

*Effective Date 01/29/2019

*Status Active

*Description Test Class

*Short Description Test

Long Description

Business Justification

Attachments (0)

Request Comments

Questions

*1. What is the reason for the new or updated Class code?

Answer

*2. Are new Payroll Chartfield Combinations required? If yes, attach spreadsheet with new chartfield combinations

Answer

3. Any additional comments about this request?

Answer

Trees

Requester		
Entered By	Entered Date/Time	
Updated By	Updated Date/Time	

The **Trees** box is only used by VISION Financial Operations, **no entry or selections** should be made under the Trees box

Your request has been assigned a **Request ID** number:

Request ID 0000000068	SetID STATE <input type="button" value="Copy"/>
Request Status Newly Created	Field Name CLASS_FLD
Field Action Add	*Field Value 00002
Telephone 802/828-0678	Email ID john.becker@vermont.gov
*Business Unit 01110 <input type="text"/>	
Core Information	Business Justification
*Effective Date 01/29/2019 <input type="text"/>	Attachments (0)
*Status Active <input type="text"/>	
*Description Test Class <input type="text"/>	
*Short Description Test <input type="text"/>	
Long Description	

Select **Submit for Approval** from the **Request Action** drop-down menu and click **Go**:

Request ID 0000000068	SetID STATE <input type="button" value="Copy"/>
Request Status Newly Created	Field Name CLASS_FLD
Field Action Add	*Field Value 00002
Telephone 802/828-0678	Email ID john.becker@vermont.gov
*Business Unit 01110 <input type="text"/>	
Core Information	Business Justification
*Effective Date 01/29/2019 <input type="text"/>	Attachments (0)
*Status Active <input type="text"/>	
*Description Test Class <input type="text"/>	
*Short Description Test <input type="text"/>	
Long Description	
Request Comments	
Questions	
Trees	
Request Action <input type="text" value="Submit for Approval"/>	<input type="button" value="Go"/>
Requester	
Entered By JBECKER John M Becker	Entered Date/Time 01/30/2019 10:30AM
Updated By JBECKER John M Becker	Updated Date/Time 01/30/2019 10:30AM
<input type="button" value="Save"/> <input type="button" value="Notify"/>	

Click on the [View Approval Flow](#) link to see approval routing:

*Business Unit 01110

Core Information		Business Justification	
*Effective Date	01/29/2019	Attachments (0)	
*Status	Active		
*Description	Test Class		
*Short Description	Test		
Long Description			

Request Comments

Questions

Trees

Request Action [View Approval Flow](#)

Requester	JBECKER	John M Becker	
Entered By	JBECKER	John M Becker	Entered Date/Time 01/30/2019 10:30AM
Updated By	JBECKER	John M Becker	Updated Date/Time 01/30/2019 10:34AM

The [Approval Flow](#) box opens, click the [Multiple Approvers](#) link to see who can approve your request:

Approval Flow Help

Field Request Approval Stage

Request ID 000000007: Pending View/Hide Comments
Start New Path

Path for Fields Approval

Pending

Multiple Approvers +

Chartfield FINOPS Approvers +

Comments

Approver #1	
Name:	Peggy Brooks
Description:	Peggy Brooks
Approver #2	
Name:	Collins, Nancy E
Description:	Collins, Nancy E
Approver #3	
Name:	Karen C Jaquish
Description:	Karen C Jaquish
Approver #4	
Name:	Joe Harris
Description:	Joe Harris
Approver #5	
Name:	Becker, John M
Description:	Becker, John M
Approver #6	
Name:	Daniel D Shepard
Description:	Daniel D Shepard

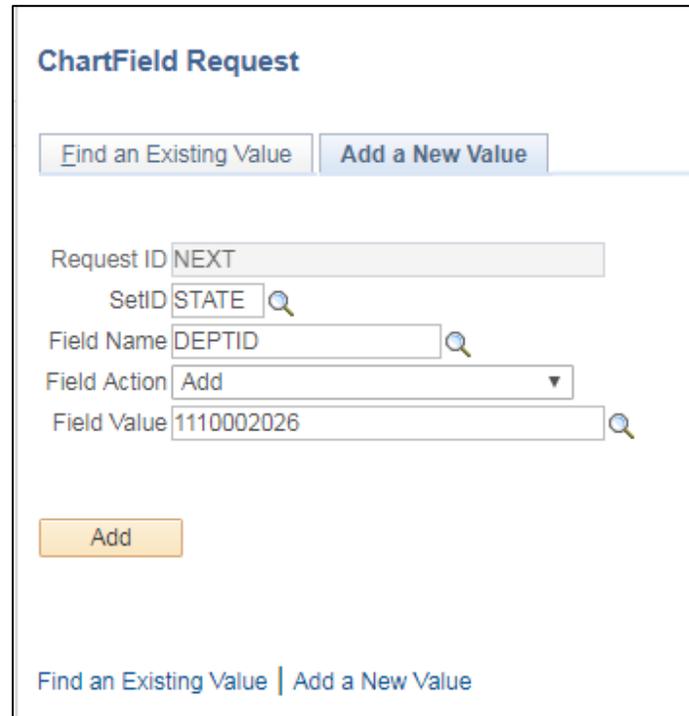
Completing a ChartField Request Form for a Dept ID

Situations where this form is used: When you need to add, update, or inactivate a Dept ID.

WorkCenter navigation: General Ledger WorkCenter > Links pagelet > Chartfields > ChartField Request
or

Navigator Menu navigation: Set Up Financials/Supply Chain > Common Definitions > Design Chartfields
> Define Values > ChartField Request

The **Add a New Value** page opens:



The screenshot shows the 'ChartField Request' form. At the top, there are two buttons: 'Find an Existing Value' and 'Add a New Value'. Below these are five input fields: 'Request ID' with the value 'NEXT', 'SetID' with the value 'STATE' and a magnifying glass icon, 'Field Name' with the value 'DEPTID' and a magnifying glass icon, 'Field Action' with a dropdown menu showing 'Add', and 'Field Value' with the value '1110002026' and a magnifying glass icon. Below the fields is an orange 'Add' button. At the bottom of the form, there are two links: 'Find an Existing Value' and 'Add a New Value'.

Request ID defaults to NEXT

SetID enter STATE

Field Name select DEPTID from the list of options

Field Action select from the drop-down menu

- Options are Add or Update

Field Value enter the value you want to add or update (10 characters)

- Finance and Management reserves the right to change the value to comply with VISION's numbering convention

Click **Add**

The **DEPT ID ChartField Request** page opens:

Request ID NEXT
Request Status Newly Created
Field Action Add
Telephone
*Business Unit

SetID STATE
Field Name DEPTID
*Field Value 1110002026
Email ID john.becker@vermont.gov

Core Information

*Effective Date 01/30/2019
*Status Active
*Description
*Short Description
[Long Description](#)
[Attributes](#)

Business Justification

*Dept ID Level
*Detail Dept ID Roll-up
Attachments (0)

Request Comments

Questions

*1. What is the reason for the new or changed Dept ID?
Answer

*2. Will employee positions be assigned to this Dept ID in VTHR?
Answer

*3. Are new Payroll Chartfield Combinations required? If yes, attach spreadsheet with new chartfield combinations
Answer

4. Any additional comments about this request?
Answer

Trees

Telephone – Enter the telephone number for the contact person

Business Unit – Enter the business unit for approval routing purposes

Effective Date – Enter the effective date for the chartfield

Status – Select ‘Active’ or ‘Inactive’ as appropriate

Description – Enter a description (up to 30 characters)

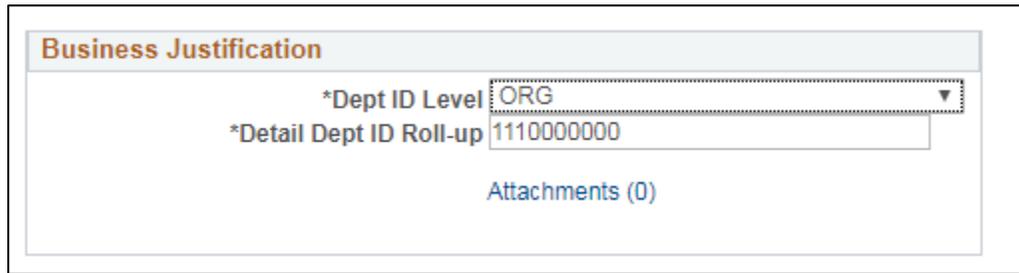
Short Description – Enter a short description (up to 10 characters)

Long Description – Click the **long Description** link – this is an optional field where you can add any additional information about the Dept ID that the requestor believes is important, for example a full description of the purpose for the Dept ID.

Attributes – Leave blank - only used by VISION Financial Operations

Dept ID Level – Select ‘Approp’, ‘Detail’, or ‘ORG’

Detail Dept ID Roll-up – Enter the roll-up Dept ID, if “Approp’ is selected for the level, the roll-up Dept ID should be the same as the requested Dept ID



The screenshot shows a form section titled "Business Justification". It contains two fields: "*Dept ID Level" with a dropdown menu showing "ORG" and a downward arrow, and "*Detail Dept ID Roll-up" with a text input field containing "1110000000". Below these fields is a link that says "Attachments (0)".

Request Comments – Expand the **Request Comments** box – this is an optional field to add any relevant comments.



The screenshot shows a form section titled "Request Comments". It features a large, empty text area for entering comments. There is a small icon in the bottom left corner and a small icon in the bottom right corner of the text area.

The **Attachments** link - – this is an optional field used to attach relevant files to the request. See exercise on page 41 for instructions on adding an attachment to a chartfield request.

Answer the four questions and click **Save**:

Request ID	NEXT	SetID	STATE
Request Status	Newly Created	Field Name	DEPTID
Field Action	Add	*Field Value	1110002026
Telephone	<input type="text"/>	Email ID	john.becker@vermont.gov
*Business Unit	<input type="text"/>		

Core Information	Business Justification		
*Effective Date	01/30/2019	*Dept ID Level	<input type="text"/>
*Status	Active	*Detail Dept ID Roll-up	<input type="text"/>
*Description	<input type="text"/>		
*Short Description	<input type="text"/>		Attachments (0)
	Long Description		
	Attributes		

Request Comments

Questions

*1. What is the reason for the new or changed Dept ID?
Answer

*2. Will employee positions be assigned to this Dept ID in VTNR?
Answer

*3. Are new Payroll Chartfield Combinations required? If yes, attach spreadsheet with new chartfield combinations
Answer

4. Any additional comments about this request?
Answer

Trees

Request Action	<input type="text"/>	Go
Requester		
Entered By	JBECKER John M Becker	Entered Date/Time 01/30/2019 11:00AM
Updated By	JBECKER John M Becker	Updated Date/Time 01/30/2019 11:00AM

The **Trees** box is only used by VISION Financial Operations, **no entry or selections** should be made under the Trees box

Your request has been assigned a **Request ID** number:

Request ID 000000069	SetID STATE Copy
Request Status Newly Created	Field Name DEPTID
Field Action Add	*Field Value 1110002026
Telephone 802/828-0678	Email ID john.becker@vermont.gov
*Business Unit 01110 <input type="text"/>	
Core Information	Business Justification
*Effective Date 01/30/2019 <input type="text"/>	*Dept ID Level ORG <input type="text"/>
*Status Active <input type="text"/>	*Detail Dept ID Roll-up 1110000000 <input type="text"/>
*Description TEST DEPT ID <input type="text"/>	Attachments (0)
*Short Description TEST <input type="text"/>	
Long Description	
Attributes	

Select **Submit for Approval** from the **Request Action** drop-down menu and click **Go**:

Request ID 000000069	SetID STATE Copy
Request Status Newly Created	Field Name DEPTID
Field Action Add	*Field Value 1110002026
Telephone 802/828-0678	Email ID john.becker@vermont.gov
*Business Unit 01110 <input type="text"/>	
Core Information	Business Justification
*Effective Date 01/30/2019 <input type="text"/>	*Dept ID Level ORG <input type="text"/>
*Status Active <input type="text"/>	*Detail Dept ID Roll-up 1110000000 <input type="text"/>
*Description TEST DEPT ID <input type="text"/>	Attachments (0)
*Short Description TEST <input type="text"/>	
Long Description	
Attributes	
Request Comments	
Questions	
Trees	
Request Action <input type="text" value="Submit for Approval"/>	Go
Requester	
Entered By JBECKER John M Becker	Entered Date/Time 01/30/2019 11:00AM
Updated By JBECKER John M Becker	Updated Date/Time 01/30/2019 11:00AM

Click on the **View Approval Flow** link to see approval routing:

The screenshot shows a web form with two main sections: **Core Information** and **Business Justification**.
Core Information:
*Business Unit: 01110
*Effective Date: 01/30/2019
*Status: Active
*Description: TEST DEPT ID
*Short Description: TEST
Links: Long Description, Attributes
Business Justification:
*Dept ID Level: ORG
*Detail Dept ID Roll-up: 1110000000
Attachments (0)
Below these sections are expandable sections for **Request Comments**, **Questions**, and **Trees**.
At the bottom, there is a **Request Action** dropdown, a **Go** button, and a **View Approval Flow** link.
Metadata:
Requester: JBECKER, John M Becker
Entered By: JBECKER, John M Becker, Entered Date/Time: 01/30/2019 11:00AM
Updated By: JBECKER, John M Becker, Updated Date/Time: 01/30/2019 11:04AM
Buttons: Save, Return to Search, Notify

The **Approval Flow** box opens, click the **Multiple Approvers** link to see who can approve your request:

The screenshot shows a window titled **Approval Flow** with a **Help** link. The main heading is **Field Request Approval Stage**.
Request ID 000000007: Pending (with View/Hide Comments and Start New Path links)
Path for Fields Approval
Pending
Multiple Approvers
Chartfield FINOPS Approvers
Comments
Return button

Approver #1	
Name:	Peggy Brooks
Description:	Peggy Brooks
Approver #2	
Name:	Collins,Nancy E
Description:	Collins,Nancy E
Approver #3	
Name:	Karen C Jaquish
Description:	Karen C Jaquish
Approver #4	
Name:	Joe Harris
Description:	Joe Harris
Approver #5	
Name:	Becker,John M
Description:	Becker,John M
Approver #6	
Name:	Daniel D Shepard
Description:	Daniel D Shepard
<input type="button" value="Close"/>	

Completing a ChartField Request Form for a Fund Code

Situations where this form is used: When you need to add, modify, or inactivate a Fund Code

WorkCenter navigation: General Ledger WorkCenter > Links pagelet > Chartfields > ChartField Request
or

Navigator Menu navigation: Set Up Financials/Supply Chain > Common Definitions > Design Chartfields
> Define Values > ChartField Request

The **Add a New Value** page opens:



The screenshot shows the 'ChartField Request' form. At the top, there are two buttons: 'Find an Existing Value' and 'Add a New Value'. Below these are five input fields: 'Request ID' with the value 'NEXT', 'SetID' with the value 'STATE' and a search icon, 'Field Name' with the value 'FUND_CODE' and a search icon, 'Field Action' with a dropdown menu showing 'Add', and 'Field Value' with the value '22069' and a search icon. At the bottom left of the form is an orange 'Add' button. At the bottom of the form, there are two links: 'Find an Existing Value' and 'Add a New Value'.

Request ID defaults to NEXT

SetID enter STATE

Field Name select FUND_CODE from the list of options

Field Action select from the drop-down menu

- Options are Add or Update

Field Value enter the value you want to add or update (5 characters)

- Finance and Management reserves the right to change the value to comply with VISION's numbering convention

Click **Add**

The **Fund Code ChartField Request** page opens:

Request ID NEXT
Request Status Newly Created
Field Action Add
Telephone
*Business Unit

SetID STATE
Field Name FUND_CODE
*Field Value 22069
Email ID john.becker@vermont.gov

Core Information
*Effective Date 01/30/2019
*Status Active
*Description
*Short Description
[Long Description](#)
[Attributes](#)

Business Justification
Attachments (0)

Request Comments

Questions

*1. Is there a Statute or Act creating or changing this Fund? Please provide the Statute or Act, if applicable.
Answer

*2. What authorizes the budget for this fund? (Appropriation Act, Excess Receipts, Demand Driven)
Answer

*3. What is the authorized uses for the Fund?
Answer

*4. What is the revenue sources for the Fund?
Answer

*5. Are new Payroll Chartfield Combinations required? If yes, attach spreadsheet with new chartfield combinations
Answer

Telephone – Enter the telephone number for the contact person

Business Unit – Enter the business unit for approval routing purposes

Effective Date – Enter the effective date for the chartfield

Status – Select ‘Active’ or ‘Inactive’ as appropriate

Description – Enter a description (up to 30 characters)

Short Description – Enter a short description (up to 10 characters)

Long Description – Click the **long Description** link – this is an optional field where you can add any additional information about the Fund Code that the requestor believes is important, for example a statute reference, or full name that can’t fit in the Description box due to the limit of 30 characters.

Attributes – Leave blank - only used by VISION Financial Operations

Request Comments – Expand the **Request Comments** box – this is an optional field to add any relevant comments.

A screenshot of a software interface showing a text input field. The field is titled "Request Comments" in a light blue header bar. The text area is empty and has a small icon in the bottom right corner. A small blue icon is visible in the bottom left corner of the overall container.

The **Attachments** link - – this is an optional field used to attach relevant files to the request. See exercise on page 41 for instructions on adding an attachment to a chartfield request.

Answer the six questions and click **Save**:

Questions	
*1.	Is there a Statute or Act creating or changing this Fund? Please provide the Statute or Act, if applicable.
Answer	<input type="text"/>
*2.	What authorizes the budget for this fund? (Appropriation Act, Excess Receipts, Demand Driven)
Answer	<input type="text"/>
*3.	What is the authorized uses for the Fund?
Answer	<input type="text"/>
*4.	What is the revenue sources for the Fund?
Answer	<input type="text"/>
*5.	Are new Payroll Chartfield Combinations required? If yes, attach spreadsheet with new chartfield combinations
Answer	<input type="text"/>
6.	Any additional comments about this request?
Answer	<input type="text"/>

Trees	
Requester	Entered Date/Time
Entered By	Updated Date/Time
Updated By	

The **Trees** box is only used by VISION Financial Operations, **no entry or selections** should be made under the Trees box

Your request has been assigned a **Request ID** number:

Request ID 000000070	SetID STATE Copy
Request Status Newly Created	Field Name FUND_CODE
Field Action Add	*Field Value 22069
Telephone 802/828-0678	Email ID john.becker@vermont.gov
*Business Unit 01110 <input type="text"/>	
Core Information	Business Justification
*Effective Date 01/30/2019 <input type="text"/>	Attachments (0)
*Status Active <input type="text"/>	
*Description Test Fund <input type="text"/>	
*Short Description TEST <input type="text"/>	
Long Description	
Attributes	
Request Comments	

Select **Submit for Approval** from the **Request Action** drop-down menu and click **Go**:

Request ID 000000070	SetID STATE Copy
Request Status Newly Created	Field Name FUND_CODE
Field Action Add	*Field Value 22069
Telephone 802/828-0678	Email ID john.becker@vermont.gov
*Business Unit 01110 <input type="text"/>	
Core Information	Business Justification
*Effective Date 01/30/2019 <input type="text"/>	Attachments (0)
*Status Active <input type="text"/>	
*Description Test Fund <input type="text"/>	
*Short Description TEST <input type="text"/>	
Long Description	
Attributes	
Request Comments	
Questions	
Trees	
Request Action Submit for Approval <input type="text"/>	Go
Requester	
Entered By JBECKER John M Becker	Entered Date/Time 01/30/2019 11:24AM
Updated By JBECKER John M Becker	Updated Date/Time 01/30/2019 11:24AM

Click on the **View Approval Flow** link to see approval routing:

*Business Unit 01110

Core Information

*Effective Date 01/30/2019

*Status Active

*Description Test Fund

*Short Description TEST

Long Description

Attributes

Business Justification

Attachments (0)

Request Comments

Questions

Trees

Request Action [Dropdown] Go View Approval Flow

Requester JBECKER John M Becker

Entered By JBECKER John M Becker Entered Date/Time 01/30/2019 11:24AM

Updated By JBECKER John M Becker Updated Date/Time 01/30/2019 11:25AM

Save Return to Search Notify Add

The **Approval Flow** box opens, click the **Multiple Approvers** link to see who can approve your request:

Approval Flow

Field Request Approval Stage

Request ID 000000007: Pending View/Hide Comments Start New Path

Path for Fields Approval

Pending

Multiple Approvers

Chartfield FINOPS Approvers

Comments

Return

Approver #1	
Name:	Peggy Brooks
Description:	Peggy Brooks
Approver #2	
Name:	Collins,Nancy E
Description:	Collins,Nancy E
Approver #3	
Name:	Karen C Jaquish
Description:	Karen C Jaquish
Approver #4	
Name:	Joe Harris
Description:	Joe Harris
Approver #5	
Name:	Becker,John M
Description:	Becker,John M
Approver #6	
Name:	Daniel D Shepard
Description:	Daniel D Shepard
<input type="button" value="Close"/>	

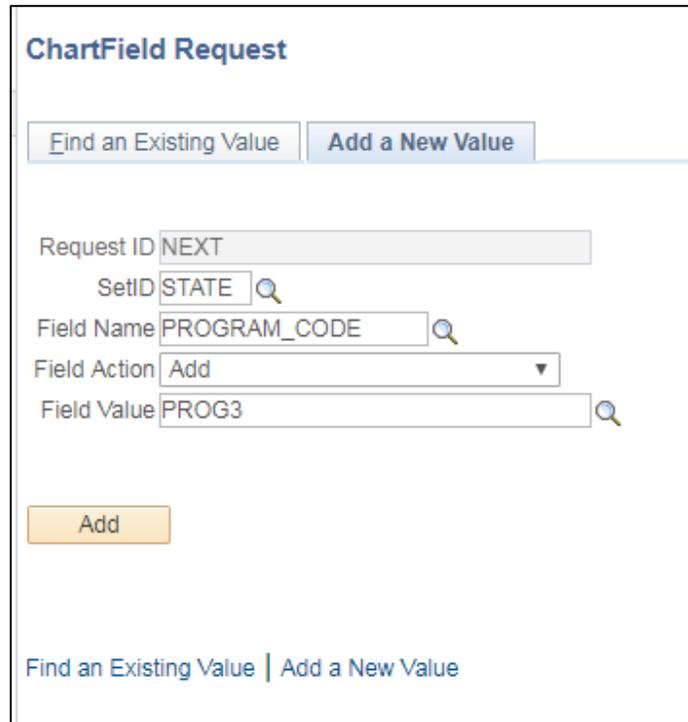
Completing a ChartField Request Form for a Program Code

Situations where this form is used: When you need to add, update, or inactivate a Program Code

WorkCenter navigation: General Ledger WorkCenter > Links pagelet > Chartfields > ChartField Request
or

Navigator Menu navigation: Set Up Financials/Supply Chain > Common Definitions > Design Chartfields
> Define Values > ChartField Request

The **Add a New Value** page opens:



The screenshot shows the 'ChartField Request' form with the following fields and values:

- Request ID: NEXT
- SetID: STATE
- Field Name: PROGRAM_CODE
- Field Action: Add
- Field Value: PROG3

Buttons for 'Find an Existing Value' and 'Add a New Value' are visible at the top and bottom of the form. An 'Add' button is located below the Field Value field.

Request ID defaults to NEXT

SetID enter STATE

Field Name select PROGRAM_CODE from the list of options

Field Action select from the drop-down menu

- Options are Add or Update

Field Value enter the value you want to add or update (5 characters)

- Finance and Management reserves the right to change the value to comply with VISION's numbering convention

Click **Add**

The **Program Code ChartField Request** page opens:

Request ID NEXT
Request Status Newly Created
Field Action Add
Telephone
*Business Unit

SetID STATE
Field Name PROGRAM_CODE
*Field Value PROG3
Email ID john.becker@vermont.gov

Core Information
*Effective Date 01/30/2019
*Status Active
*Description
*Short Description
[Long Description](#)

Business Justification
Attachments (0)

Request Comments

Questions

*1. What is the reason for the new or updated Program code?
Answer

*2. Are new Payroll Chartfield Combinations required? If yes, attach spreadsheet with new chartfield combinations
Answer

3. Any additional comments about this request?
Answer

Trees

Requester	Entered By	Entered Date/Time

Updated By Updated Date/Time

Save Notify

Telephone – Enter the telephone number for the contact person

Business Unit – Enter the business unit for approval routing purposes

Effective Date – Enter the effective date for the chartfield

Status – Select ‘Active’ or ‘Inactive’ as appropriate

Description – Enter a description (up to 30 characters)

Short Description – Enter a short description (up to 10 characters)

Long Description – Click the **long Description** link – this is an optional field where you can add any additional information about the Program Code that the requestor believes is important, for example a full description of the purpose for the code.

Request Comments – Expand the **Request Comments** box – this is an optional field to add any relevant comments.

A screenshot of a software interface showing a 'Request Comments' field. The field is a large, empty rectangular box with a light blue header bar containing the text 'Request Comments' and a small downward-pointing arrow icon. The box is outlined with a thin black border and has a small blue icon in the bottom-left corner.

The **Attachments** link - – this is an optional field used to attach relevant files to the request. See exercise on page 41 for instructions on adding an attachment to a chartfield request.

Answer the three questions below:

Questions 3 – Requires a response for all AHS departments for all program code chartfield requests. The question response field should indicate the program code was reviewed and determined to either 1) not require an AHS Program Report tree node, or 2) Does require an AHS Program Report Tree Node for CMIA Draw Queries. If the program code does need to be on the AHS Program Report Tree, the requestor should indicate the Tree Node the Program Code should be inserted below. For nodes with a child node, the child node should be identified when setting up the new program code.

Sample Response AHS: Question 3. Answer – The program code should be added under child node VR Section 110.

Click **Save**

Request ID	NEXT	SetID	STATE
Request Status	Newly Created	Field Name	PROGRAM_CODE
Field Action	Add	*Field Value	PROG3
Telephone	<input type="text"/>	Email ID	john.becker@vermont.gov
*Business Unit	<input type="text"/>		

Core Information

*Effective Date:

*Status:

*Description:

*Short Description:

[Long Description](#)

Business Justification

[Attachments \(0\)](#)

Request Comments

Questions

*1. What is the reason for the new or updated Program code?

Answer:

*2. Are new Payroll Chartfield Combinations required? If yes, attach spreadsheet with new chartfield combinations

Answer:

3. Any additional comments about this request?

Answer:

Trees

Requester		Entered Date/Time	
Entered By		Updated Date/Time	
Updated By			

The **Trees** box is only used by VISION Financial Operations, **no entry or selections** should be made under the Trees box

Your request has been assigned a **Request ID** number:

Request ID	000000071	SetID	STATE	<input type="button" value="Copy"/>
Request Status	Newly Created	Field Name	PROGRAM_CODE	
Field Action	Add	*Field Value	PROG3	
Telephone	802/828-0678	Email ID	john.becker@vermont.gov	
*Business Unit	01110			

Core Information

*Effective Date:

*Status:

*Description:

*Short Description:

[Long Description](#)

Business Justification

[Attachments \(0\)](#)

Request Comments

Select **Submit for Approval** from the **Request Action** drop-down menu and click **Go**:

Request ID 000000071	SetID STATE Copy
Request Status Newly Created	Field Name PROGRAM_CODE
Field Action Add	*Field Value PROG3
Telephone 802/828-0678	Email ID john.becker@vermont.gov
*Business Unit 01110 <input type="text"/>	
Core Information	Business Justification
*Effective Date 01/30/2019 <input type="text"/>	Attachments (0)
*Status Active <input type="text"/>	
*Description Test Program <input type="text"/>	
*Short Description Test <input type="text"/>	
Long Description <input type="text"/>	
Request Comments	
Questions	
Trees	
Request Action <input type="text" value="Submit for Approval"/>	Go
Requester	
Entered By JBECKER John M Becker	Entered Date/Time 01/30/2019 11:34AM
Updated By JBECKER John M Becker	Updated Date/Time 01/30/2019 11:34AM

Click on the **View Approval Flow** link to see approval routing:

*Business Unit 01110

Core Information

*Effective Date 01/30/2019

*Status Active

*Description Test Program

*Short Description Test

Long Description

Business Justification

Attachments (0)

Request Comments

Questions

Trees

Request Action [Dropdown] [Go] [View Approval Flow](#)

Requester	JBECKER	John M Becker	
Entered By	JBECKER	John M Becker	Entered Date/Time 01/30/2019 11:34AM
Updated By	JBECKER	John M Becker	Updated Date/Time 01/30/2019 11:35AM

The **Approval Flow** box opens, click the **Multiple Approvers** link to see who can approve your request:

Approval Flow Help

Field Request Approval Stage

Request ID 000000007: Pending View/Hide Comments

[Start New Path](#)

Path for Fields Approval

Pending

Multiple Approvers

Chartfield FINOPS Approvers +

Comments

Approver #1	
Name:	Peggy Brooks
Description:	Peggy Brooks
Approver #2	
Name:	Collins,Nancy E
Description:	Collins,Nancy E
Approver #3	
Name:	Karen C Jaquish
Description:	Karen C Jaquish
Approver #4	
Name:	Joe Harris
Description:	Joe Harris
Approver #5	
Name:	Becker,John M
Description:	Becker,John M
Approver #6	
Name:	Daniel D Shepard
Description:	Daniel D Shepard
<input type="button" value="Close"/>	

Completing a ChartField Request Form for a Project ID

Situations where this form is used: When you need to add, update, or inactivate a Project ID

WorkCenter navigation: General Ledger WorkCenter > Links pagelet > Chartfields > ChartField Request
or

Navigator Menu navigation: Set Up Financials/Supply Chain > Common Definitions > Design Chartfields
> Define Values > ChartField Request

The **Add a New Value** page opens:



The screenshot shows the 'ChartField Request' form with the following fields and values:

- Request ID: NEXT
- SetID: 01110
- Field Name: PROJECT_ID
- Field Action: Add
- Field Value: TESTPROJECTID1

Buttons for 'Find an Existing Value' and 'Add a New Value' are visible at the top and bottom of the form.

Request ID defaults to NEXT

SetID enter your department specific SetID, normally your business unit

Field Name select PROJECT_ID from the list of options

Field Action select from the drop-down menu

- Options are Add or Update

Field Value enter the value you want to add or update (15 characters max)

- Finance and Management reserves the right to change the value to comply with VISION's numbering convention

Click **Add**

The **Project ID ChartField Request** page opens:

Request ID NEXT
Request Status Newly Created
Field Action Add
Telephone
*Business Unit

SetID 01110
Field Name PROJECT_ID
*Field Value
Email ID

Core Information

*End Date
*Start Date
*Status
*Description

Business Justification

Attachments (0)

Request Comments

Questions

*1. Will this project have a funding source controlled budget?
Answer

*2. What is the Employee ID of the Project Manager?
Answer

*3. Are new Payroll Chartfield Combinations required? If yes, attach spreadsheet with new chartfield combinations
Answer

4. Any additional comments about this request?
Answer

Trees

Telephone – Enter the telephone number for the contact person

Business Unit – Enter the business unit for approval routing purposes

End Date – Enter the end date for the Project ID

Start Date – Enter the start date for the Project ID

Status – Select ‘Active’ or ‘Inactive’ as appropriate

Description – Enter a description (up to 30 characters)

Request Comments – Expand the **Request Comments** box – this is an optional field to add any relevant comments.

Request Comments

The **Attachments** link - – this is an optional field used to attach relevant files to the request. See exercise on page 41 for instructions on adding an attachment to a chartfield request.

Answer the four questions and click **Save**:

Request Comments

Questions

*1. Will this project have a funding source controlled budget?

Answer

*2. What is the Employee ID of the Project Manager?

Answer

*3. Are new Payroll Chartfield Combinations required? If yes, attach spreadsheet with new chartfield combinations

Answer

4. Any additional comments about this request?

Answer

Trees

<small>Requester</small>		<small>Entered Date/Time</small>
<small>Entered By</small>		<small>Updated Date/Time</small>
<small>Updated By</small>		

Save

Notify

The **Trees** box is only used by VISION Financial Operations, **no entry or selections** should be made under the Trees box

Your request has been assigned a **Request ID** number:

Request ID	000000072	SetID	01110	Copy
Request Status	Newly Created	Field Name	PROJECT_ID	
Field Action	Add	*Field Value	<input type="text" value="TESTPROJECTID1"/>	
Telephone	<input type="text" value="802/828-0678"/>	Email ID	<input type="text" value="john.becker@vermont.gov"/>	
*Business Unit	<input type="text" value="01110"/>			
Core Information		Business Justification		
*End Date	<input type="text" value="01/31/2022"/>	Attachments (0)		
*Start Date	<input type="text" value="01/30/2019"/>			
*Status	Active			
*Description	<input type="text" value="Test Project ID"/>			
Request Comments				

Select **Submit for Approval** from the **Request Action** drop-down menu and click **Go**:

Request ID	000000072	SetID	01110	Copy
Request Status	Newly Created	Field Name	PROJECT_ID	
Field Action	Add	*Field Value	<input type="text" value="TESTPROJECTID1"/>	
Telephone	<input type="text" value="802/828-0678"/>	Email ID	<input type="text" value="john.becker@vermont.gov"/>	
*Business Unit	<input type="text" value="01110"/>			
Core Information		Business Justification		
*End Date	<input type="text" value="01/31/2022"/>	Attachments (0)		
*Start Date	<input type="text" value="01/30/2019"/>			
*Status	Active			
*Description	<input type="text" value="Test Project ID"/>			
Request Comments				
Questions				
Trees				
Request Action	<input type="text" value="Submit for Approval"/>	Go		
Requester				
Entered By	JBECKER	John M Becker	Entered Date/Time	01/30/2019 11:51AM
Updated By	JBECKER	John M Becker	Updated Date/Time	01/30/2019 11:51AM
Save	Notify			

Click on the [View Approval Flow](#) link to see approval routing:

*Business Unit: 01110

Core Information

*End Date: 01/31/2022
*Start Date: 01/30/2019
*Status: Active
*Description: Test Project ID

Business Justification

Attachments (0)

Request Comments

Questions

Trees

Request Action: [Dropdown] Go View Approval Flow

Requester: JBECKER John M Becker
Entered By: JBECKER John M Becker Entered Date/Time: 01/30/2019 11:51AM
Updated By: JBECKER John M Becker Updated Date/Time: 01/30/2019 11:51AM

Save Return to Search Notify

The [Approval Flow](#) box opens, click the [Multiple Approvers](#) link to see who can approve your request:

Approval Flow Help

Field Request Approval Stage

Request ID 000000007: Pending View/Hide Comments Start New Path

Path for Fields Approval

Pending
Multiple Approvers
Chartfield FINOPS Approvers

Comments

Return

Approver #1	
Name:	Peggy Brooks
Description:	Peggy Brooks
Approver #2	
Name:	Collins,Nancy E
Description:	Collins,Nancy E
Approver #3	
Name:	Karen C Jaquish
Description:	Karen C Jaquish
Approver #4	
Name:	Joe Harris
Description:	Joe Harris
Approver #5	
Name:	Becker,John M
Description:	Becker,John M
Approver #6	
Name:	Daniel D Shepard
Description:	Daniel D Shepard
<input type="button" value="Close"/>	

Adding an Attachment to a ChartField Request

When to use: Adding an attachment while creating a chartfield request

Click the **Attachments** link – this is an optional field used to attach relevant files to the request.

The screenshot shows a web form for creating a ChartField Request. The form is divided into several sections. On the left, there is a 'Core Information' section with fields for Request ID (NEXT), Request Status (Newly Created), Field Action (Add), Telephone (802/828-0678), *Business Unit (01110), *Effective Date (01/29/2019), *Status (Active), Monetary Account Type (E), Unit of Measure, *Description (Test Account), and *Short Description (TestAcc). On the right, there is a 'Business Justification' section with a link for 'Attachments (0)' highlighted in a red box. Other fields include SetID, STATE, Field Name (ACCOUNT), *Field Value (551003), and Email ID (john.becker@vermont.gov).

The **Request Attachments** page opens, Click the **Add Attachment** button:

The screenshot shows the 'Request Attachments' page. At the top, there is a 'Details' section with a table. The table has columns for File Name, Show to Approver?, Description, User, Name, and Date/Time Stamp. Below the table, there is a message: 'Adding large attachments can take some time to upload, therefore, it is advisable to save the transaction before adding large attachments.' At the bottom, there is an 'Add Attachment' button highlighted in a red box, along with 'OK' and 'Cancel' buttons.

Click **Browse**, select your document and click **Upload**:

The screenshot shows a 'File Attachment' dialog box. It has a title bar with 'File Attachment' and a close button. There is a 'Help' link in the top right corner. The main area contains the text 'No file selected.' Below this text, there are three buttons: 'Browse...', 'Upload', and 'Cancel'. The 'Browse...' button is highlighted in a red box.

Add a **Description** and click **OK**:

Request Attachments

Request ID NEXT

Details

File Name	Show to Approver?	Description	User	Name	Date/Time Stamp
Upload_Test.docx	<input checked="" type="checkbox"/>	Test Document			

Adding large attachments can take some time to upload, therefore, it is advisable to save the transaction before adding large attachments.

Add Attachment

OK Cancel

The **Attachment** counter now shows 1 attachment:

Request ID NEXT

Request Status Newly Created

Field Action Add

Telephone

*Business Unit 02100

SetID STATE

Field Name ACCOUNT

*Field Value CF40XA

Email ID eric.hoefel@vermont.gov

Core Information

Control Account

Statistical Account

*Effective Date 07/01/2018

*Status Active

Monetary Account Type R

Unit of Measure

*Description Test Account

*Short Description TestAcct

Long Description

Business Justification

Attachments (1)

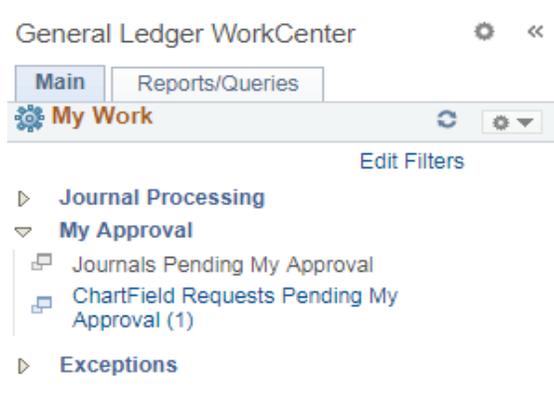
Department Level Approval of a ChartField Request Form

Situations where this is used: If a department has requested to have users set up in VISION as department level approvers, after a Chartfield Request Form is submitted by the requestor, VISION workflow routes it to a designated department Approver or a group of designated Approvers for review and approval. After the department level of approval, the request is routed to Finance and Management for final approval to be added to VISION.

WorkCenter navigation: General Ledger WorkCenter > My Work pagelet > My Approval > Chartfield Requests Pending My Approval

or

Navigator Menu navigation: Worklist > Worklist



If there is a number after the Chartfield Requests Pending My Approval, that means there are requests to be processed.

Click on link to review the Chartfield request

ChartField Requests Pending My Approval

[Refine Filter Criteria](#)

Comments

Select All / Deselect All Approve Deny Hold Pushback

Business Requests Personalize | Find | Print | Refresh First 1 of 1 Last

Request Details | **More Details** | Filter

Select	Request ID	SetID	Field Name	Field Action	Field Value		
<input type="checkbox"/>	0000000058	STATE	DEPTID	Add	1100000004		Attachments (0)

Select All / Deselect All Approve Deny Hold Pushback

Click on the Request ID link to review the request Page

ChartField Request Approval

Request ID 000000058
 Request Status Pending Approval
 Field Action Add
 Telephone 802/828-0678
 *Business Unit 01100

SetID STATE
 Field Name DEPTID
 *Field Value 110000004
 Email ID vision.exptestwf@vermont.gov

Core Information

*Effective Date 01/29/2019
 *Status Active
 *Description TestDeptID
 *Short Description Test
 Long Description
 Attributes

Business Justification

*Dept ID Level ORG
 *Detail Dept ID Roll-up 1100000000

Request Comments

Questions

*1. What is the reason for the new or changed Dept ID?
 Answer Test

*2. Will employee positions be assigned to this Dept ID in VTTHR?
 Answer Test

*3. Are new Payroll Chartfield Combinations required? If yes, attach spreadsheet with new chartfield combinations
 Answer Test

4. Any additional comments about this request?
 Answer Test

Review the Chartfield Request Form for the items entered.

Refer to the examples in this manual for the various chartfields to ensure the form is correctly completed.

Items to consider during your review:

- Is the new or updated chartfield required?
- Is the Business Unit correct?
- Is the chartfield value correct?
- Is the description provided accurate?
- Does the long description contain relevant information, such as a statute reference?
- Have all the questions been answered completely?

Once you have completed your review of the Chartfield request, scroll to the bottom of the page and click OK.

Now you have two options.

1. If you have determined the request is properly filled out, you can approve the request.

- If you have determined the request needs to be sent back to the requestor for additional information, you can deny the request.

Approval of the Chartfield Request

Click the Select box for the Request ID you want to approve.

Comments are not required to approve the request, but if you want to add them you can by expanding the Comments box, enter comments, then click approve

If you don't want to add comments, you can just Click the approve button.

ChartField Requests Pending My Approval

[Refine Filter Criteria](#)

Comments

To add comments to all selected business requests' approval processes, enter them and click the Add Comments button or any one of the three approval action buttons. Then the comments can be viewed via the View Approval Flow icon on the Business Requests grid for each business request.

Nice Job!

245 characters remaining

Select All / Deselect All

Business Requests Personalize | Find | |

First 1 of 1 Last

Select	Request ID	SetID	Field Name	Field Action	Field Value	
<input checked="" type="checkbox"/>	000000058	STATE	DEPTID	Add	1100000004	<input type="button" value="View"/> Attachments (0)

Select All / Deselect All

The request is now routed to Finance and Management for final approval to be added to VISION.

Denial of the Chartfield Request

Click the Select box for the Request ID you want to deny.

Comments are required to deny the request, click on the Comments box to expand, enter comments, then click Deny

ChartField Requests Pending My Approval

[Refine Filter Criteria](#)

Comments

To add comments to all selected business requests' approval processes, enter them and click the Add Comments button or any one of the three approval action buttons. Then the comments can be viewed via the View Approval Flow icon on the Business Requests grid for each business request.

Add Comments

Add the statute reference to the long description

205 characters remaining

Select All / Deselect All

Approve

Deny

Hold

Pushback

Business Requests

Personalize | Find | First 1 of 1 Last

Request Details

More Details

Select	Request ID	SetID	Field Name	Field Action	Field Value		
<input checked="" type="checkbox"/>	0000000058	STATE	DEPTID	Add	1100000004		Attachments (0)

Select All / Deselect All

Approve

Deny

Hold

Pushback

The request is now routed back to the requestor, where they can rework and resubmit it for approval or they can decide to cancel it.

To view Workflow

Click on the [View Approval Flow](#) link to see approval routing:

ChartField Requests Pending My Approval

[Refine Filter Criteria](#)

Comments

Select All / Deselect All

Approve

Deny

Hold

Pushback

Business Requests

Personalize | Find | First 1 of 1 Last

Request Details

More Details

Select	Request ID	SetID	Field Name	Field Action	Field Value		
<input checked="" type="checkbox"/>	0000000081	STATE	DEPTID	Add	1100000005		Attachments (0)

Select All / Deselect All

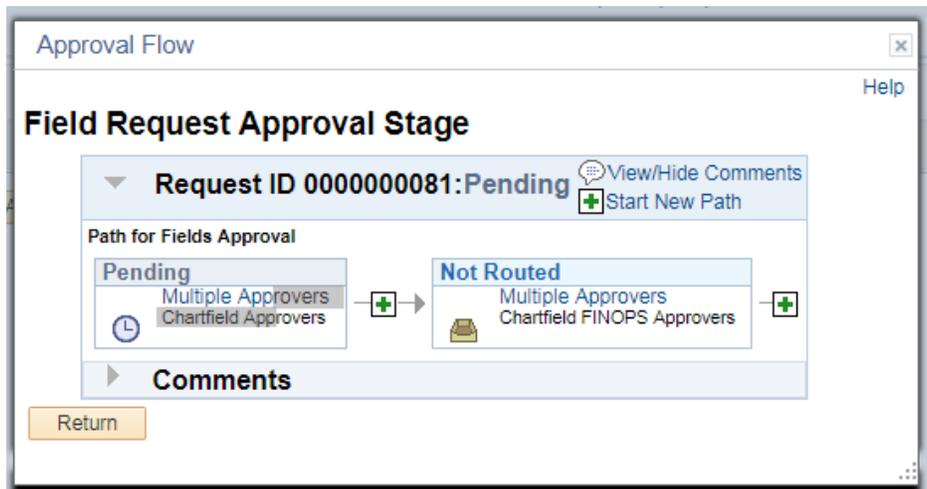
Approve

Deny

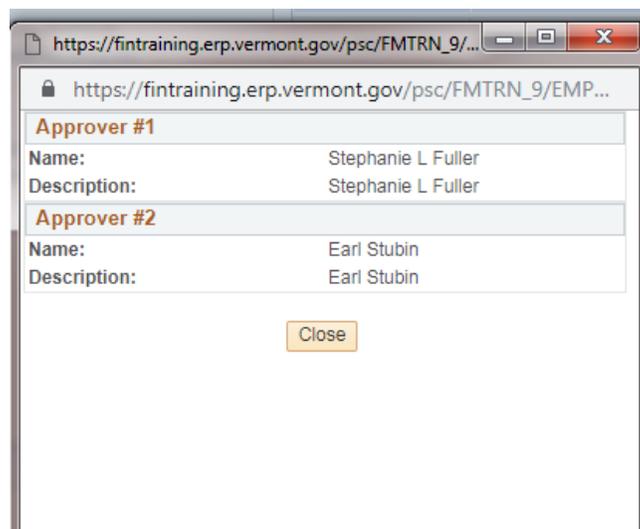
Hold

Pushback

The [Approval Flow](#) box opens, this shows the two levels of approval



Under the Pending box click the **Multiple Approvers** link to see who can approve the request at the department.



Under the Not Routed box click the **Multiple Approvers** link to see who can approve the request after its approved by the department approvers.

https://fintraining.erp.vermont.gov/psc/FMTRN_8/...

https://fintraining.erp.vermont.gov/psc/FMTRN_8/EMP...

Approver #1	
Name:	Daniel D Shepard
Description:	Daniel D Shepard

Approver #2	
Name:	John M Becker
Description:	John M Becker

Approver #3	
Name:	Joe Harris
Description:	Joe Harris

Approver #4	
Name:	Karen C Jaquish
Description:	Karen C Jaquish

Approver #5	
Name:	Collins,Nancy E
Description:	Collins,Nancy E

Approver #6	
Name:	Peggy Brooks
Description:	Peggy Brooks

Close

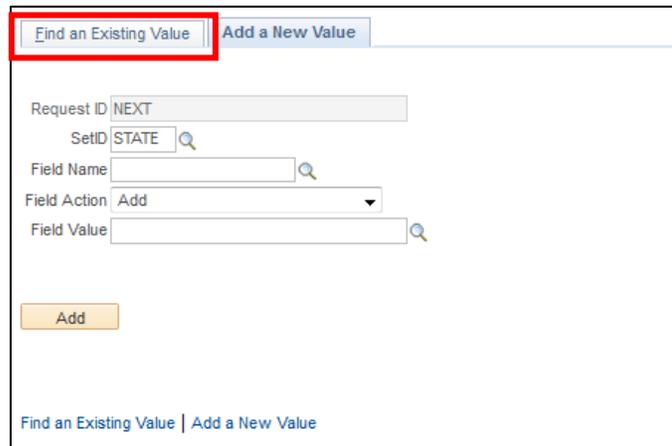
Tracking a ChartField Request Status

When to use: To track the status of a chartfield request form you submitted

WorkCenter navigation: General Ledger WorkCenter > Links pagelet > Chartfields > ChartField Request
or

Navigator Menu navigation: Set Up Financials/Supply Chain > Common Definitions > Design Chartfields
> Define Values > ChartField Request

The **Add a New Value** page opens, click the **Find an Existing Value** tab:



The screenshot shows a web interface for adding a new value. At the top, there are two tabs: 'Find an Existing Value' (highlighted with a red box) and 'Add a New Value'. Below the tabs, there are several input fields: 'Request ID' with the value 'NEXT', 'SetID' with the value 'STATE' and a search icon, 'Field Name' with a search icon, 'Field Action' with a dropdown menu showing 'Add', and 'Field Value' with a search icon. Below these fields is an 'Add' button. At the bottom of the form, there are two links: 'Find an Existing Value' and 'Add a New Value'.

Set the **Request Status** field to blank and click **Search** then select the appropriate request:

ChartField Request

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) | [Add a New Value](#)

Search Criteria

Request ID begins with

SetID =

Field Name begins with

Field Action =

Field Value begins with

Request Status =

Requester begins with

Entered By begins with

Case Sensitive

Limit the number of results to (up to 300):

[Search](#) | [Clear](#) | [Basic Search](#) | [Save Search Criteria](#)

Search Results

View All First 1-6 of 6 Last

Request ID	SetID	Field Name	Field Action	Field Value	Request Status	Requester	Entered By
0000000001	STATE	FUND_CODE	Add	EX033	Pending	RCAMLEY	RCAMLEY
0000000002	STATE	ACCOUNT	Add	CF40XX	Pending	DFORD	DFORD
0000000004	STATE	DEPTID	Add	CF40XXXXXX	Approved	WTUCKER	WTUCKER
0000000005	STATE	FUND_CODE	Add	XXX40	Approved	NCOLLINS	NCOLLINS
0000000006	STATE	FUND_CODE	Add	40XXX	Approved	NCOLLINS	NCOLLINS
0000000007	STATE	ACCOUNT	Add	CF40XA	Approved	EEST	EEST

[Find an Existing Value](#) | [Add a New Value](#)

The **ChartField Request** page opens, click on **View Approval Flow**:

Request ID 0000000007 SetID STATE [Copy](#)

Request Status Approved Field Name ACCOUNT

Field Action Add CF40XA

Telephone Email ID eric.hoefel@vermont.gov

*Business Unit 02100

Core Information

Control Account
 Statistical Account
 *Effective Date 07/01/2018
 *Status Active
 Monetary Account Type R
 Unit of Measure
 *Description Test Account
 *Short Description TestAcct
 Long Description

Business Justification

Attachments (1)

Request Comments

Questions

Trees

Request Action [Go](#) [View Approval Flow](#)

Requester EEST Eric John Hoefel

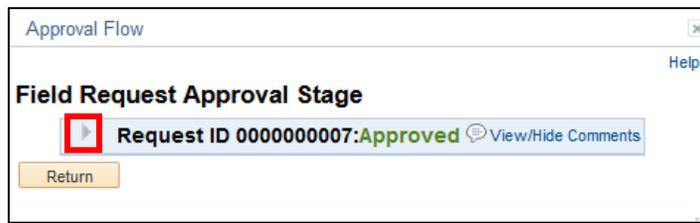
Entered By EEST Eric John Hoefel Entered Date/Time 10/30/2018 3:41PM

Updated By JBECKER Becker,John M Updated Date/Time 10/31/2018 10:34AM

[Save](#) | [Return to Search](#) | [Previous in List](#) | [Next in List](#) | [Notify](#)

[Add](#) | [Update/Display](#)

The **Approval Flow** page opens, click the rotating triangle to see who approved the request:



You may also click the [View/Hide Comments](#) link to read any comments:

